





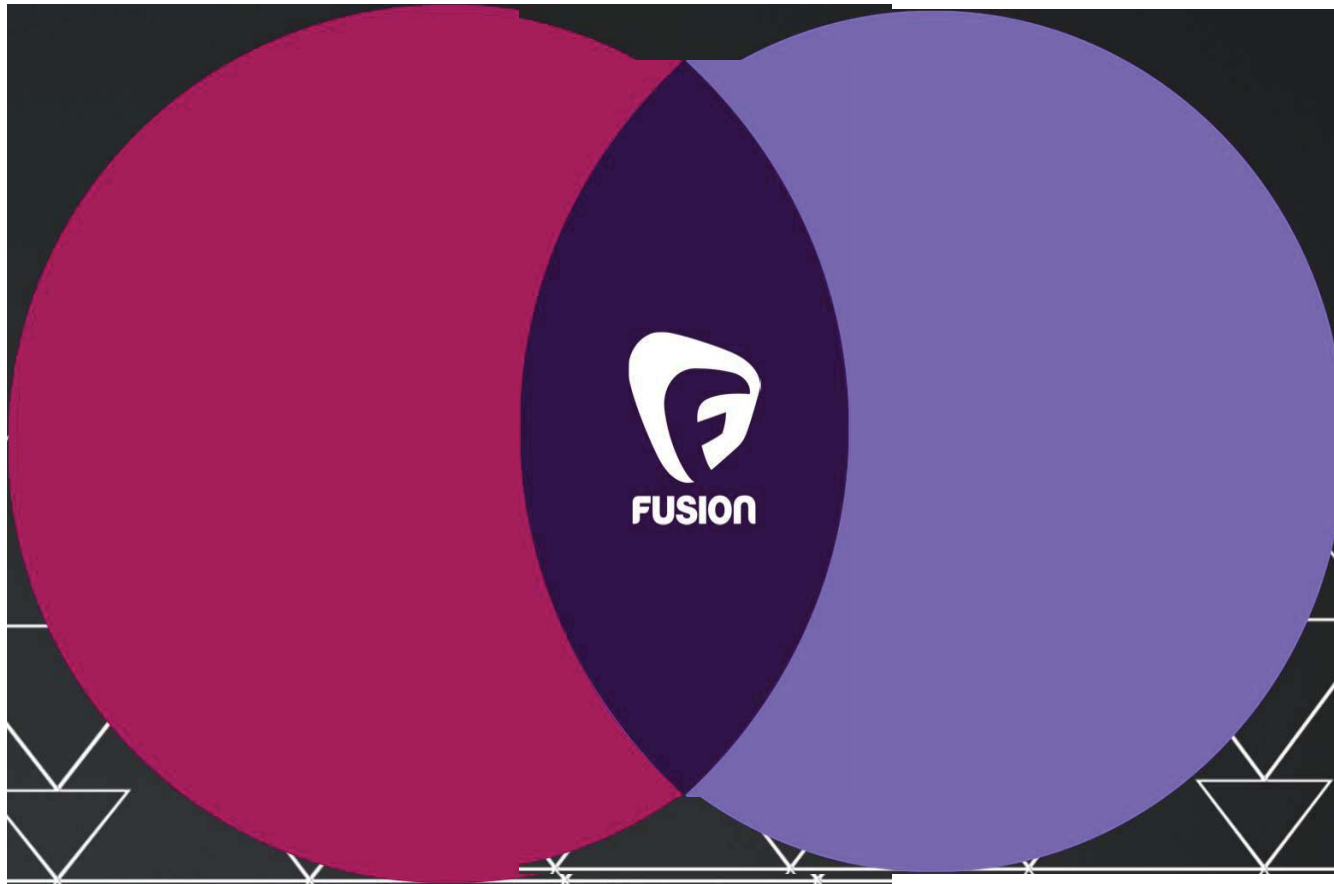
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# HISPANIC MILLENNIALS THE TWO BIGGEST DEMOGRAPHIC WAVES SINCE THE BABY BOOM



# Never has the US been more diverse.



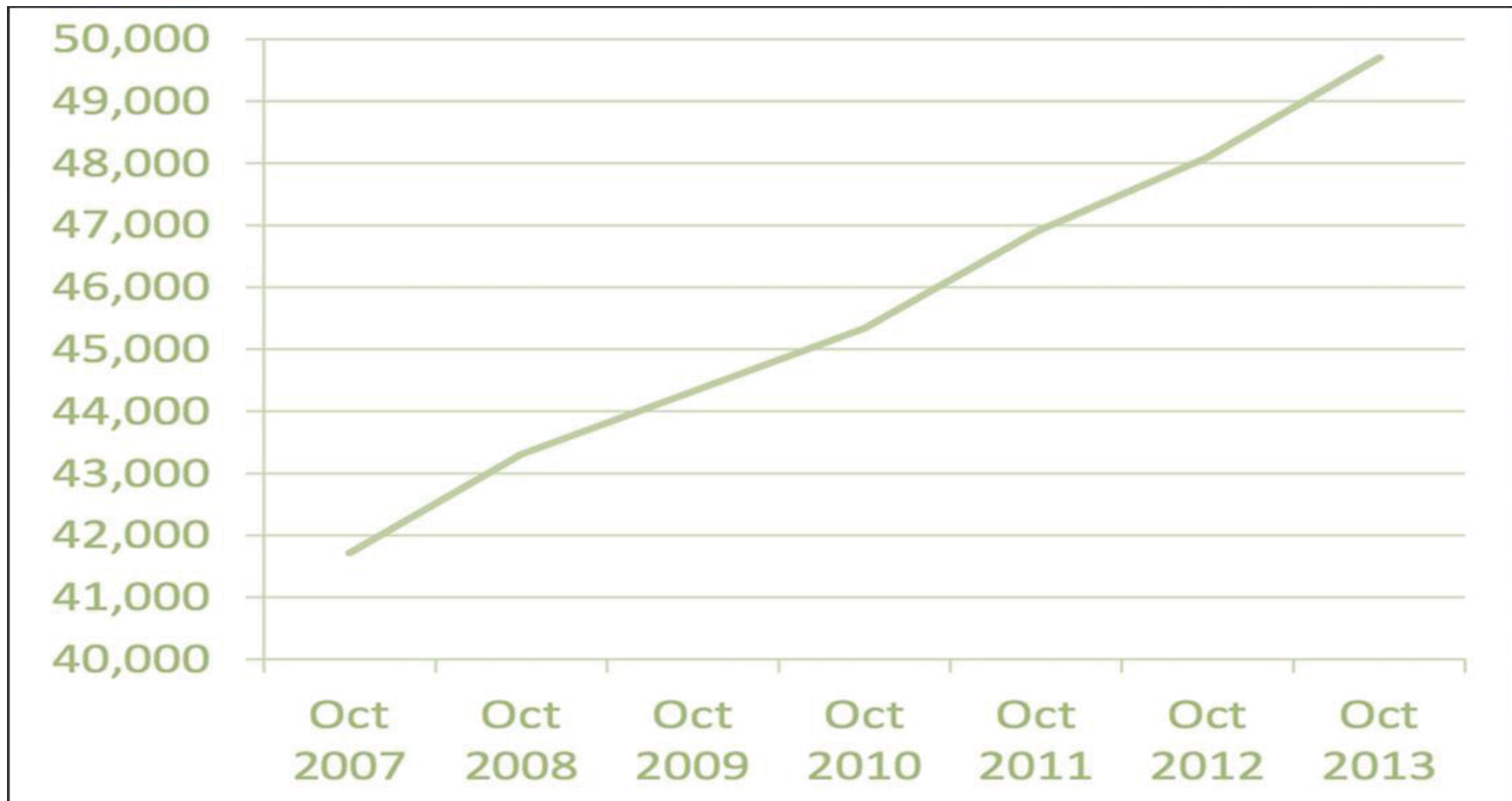
- $\frac{1}{4}$  of Millennials are Hispanic.  
 $\frac{1}{2}$  of all Hispanics are Millennial.  
The majority of Hispanics are under the age of 35  
(median age = 27).  
Since 2011, the majority of US births have been diverse
- Source: US Census 2012 & Nielsen 2013 Universe Estimates



# $\frac{1}{3}$ of the US by 2050. (132M)

- **1 in 6** Americans is now Hispanic.
- Millennials (P18-34) will become a majority minority during the next presidential term.
- **40%** (5M) of net new US households over the next decade will be Hispanic.
- Hispanics will represent **\$1.5T** in spending power by 2015.
- Source: Nielsen NPM, % of P2+ UEs 10/15/13, TV Universe Estimates. US Census 2012. Selig Center Spending Power Projections

# Hispanic TV Universe Estimate Trend



# 84% of Hispanic Homes Receive Cable or Satellite Today

- Hispanics actually drove the majority (53%) of cable subscription
- growth in the US over the last five years. Hispanic cable
- penetration is up 5% since 2008, digital cable being the greatest
- source of growth in recent years (+57%).
- Source: 2013 estimates from The Cable
- Advertising Bureau:
- <http://thecab.tv/hispanics-and-cable.php>

# Hispanics lead device adoption.

- **Over 6M** Hispanic Millennials live with in-home
- DVR access today.



- **A majority** ( $\frac{2}{3}$ ) of Hispanic Millennials live in
- game console homes. 70% of them have high speed connectivity at home.



- Hispanics are not only the ethnicity/race most likely to own smartphones,
- but **Over 4M** Hispanic Millennials have acquired
- tablets over the past three years.

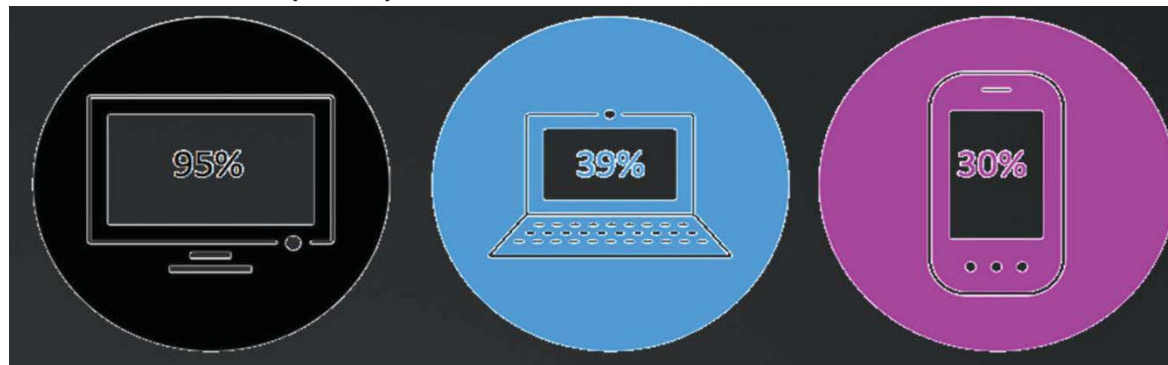


- Sources: Nielsen NPOWER Universe Estimate Report. P18-34, Q4 2013. 8

For first time in history, the US population **spent more time on smartphones during the day than in front of the tube**, or 151 minutes versus 147 minutes.

**Hispanics lead this transformation 2014**

- **Hispanic PUTs are in decline since 2012.**
- Consumer internet video traffic is on the rise, though, and will represent 69% of all traffic by 2017.
- **Hispanics are 21% of US smartphone video consumers**, almost 2X (12%) their share of TV users.



- Sources: Millward Brown 2014. Nielsen Cross-Platform Report, Q3 2013, Based on Total US Hispanic Population,
- Persons 2+ for TV and Online (Total), 13+ for Mobile. Nielsen Cross-Platform Report, Q4 2014. Cisco Visual
- Networking Index: Forecast and Methodology, 2012–2017.

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